

In today's connected world, radio has transformed into a truly anytime, anywhere, anyhow experience.

The MIDAS Survey is designed to provide context and insight into how when and where audio content is being consumed in this liberated environment.

With the increasing penetration of connected devices such as tablets and smartphones, MIDAS shows how listeners are embracing the multi-platform and multi-device offering, as well as how audio-on-demand is contributing to listening behaviour. It also reveals the activities they are doing whilst listening, where they are listening, and who they are listening with.

MIDAS is released every season, this offering is Spring 2019. The sample comprised of 2341 former RAJAR respondents willing to be re-contacted. MIDAS is collected via an Online diary and Questionnaire. Spring 2019 fieldwork took place during March.

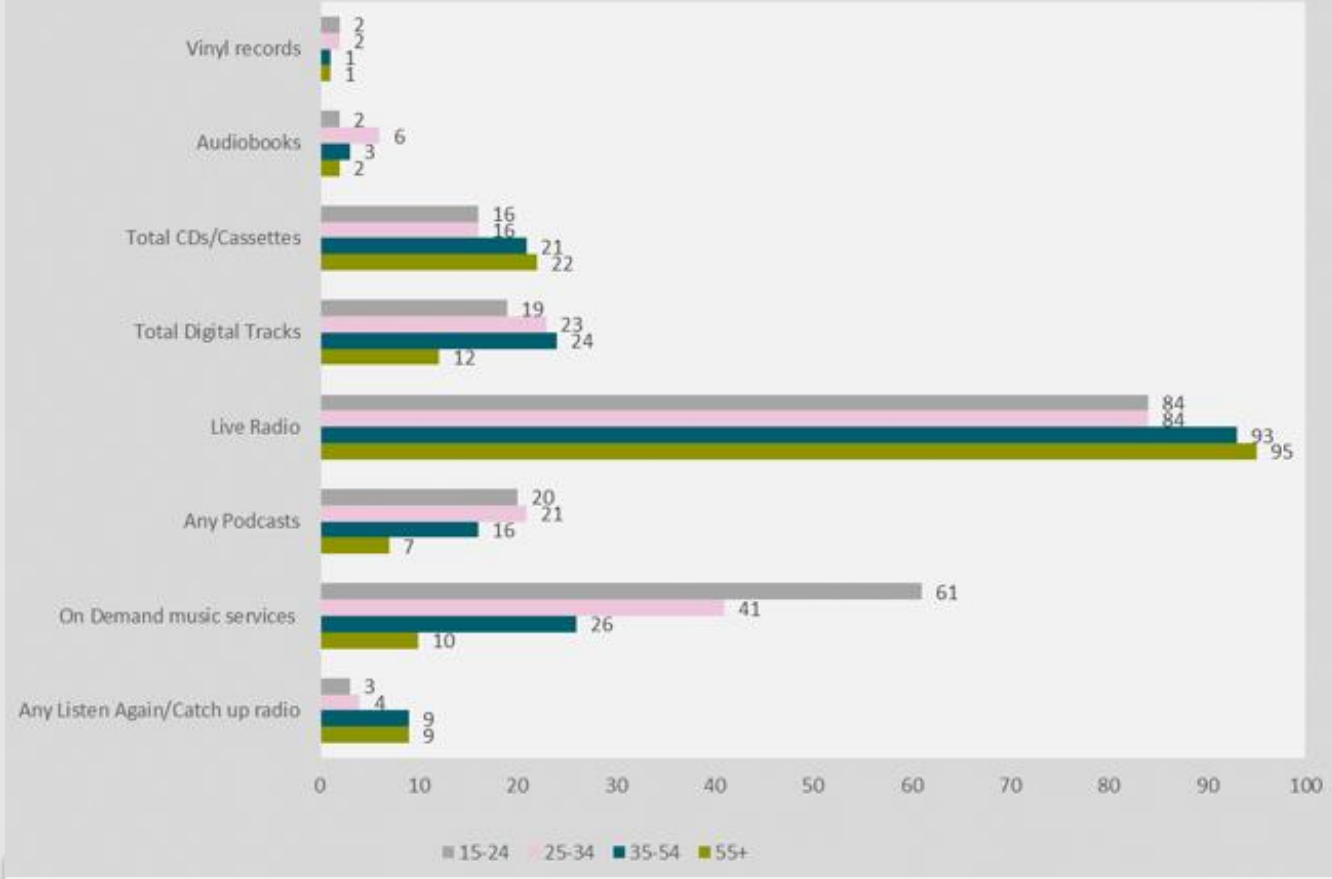
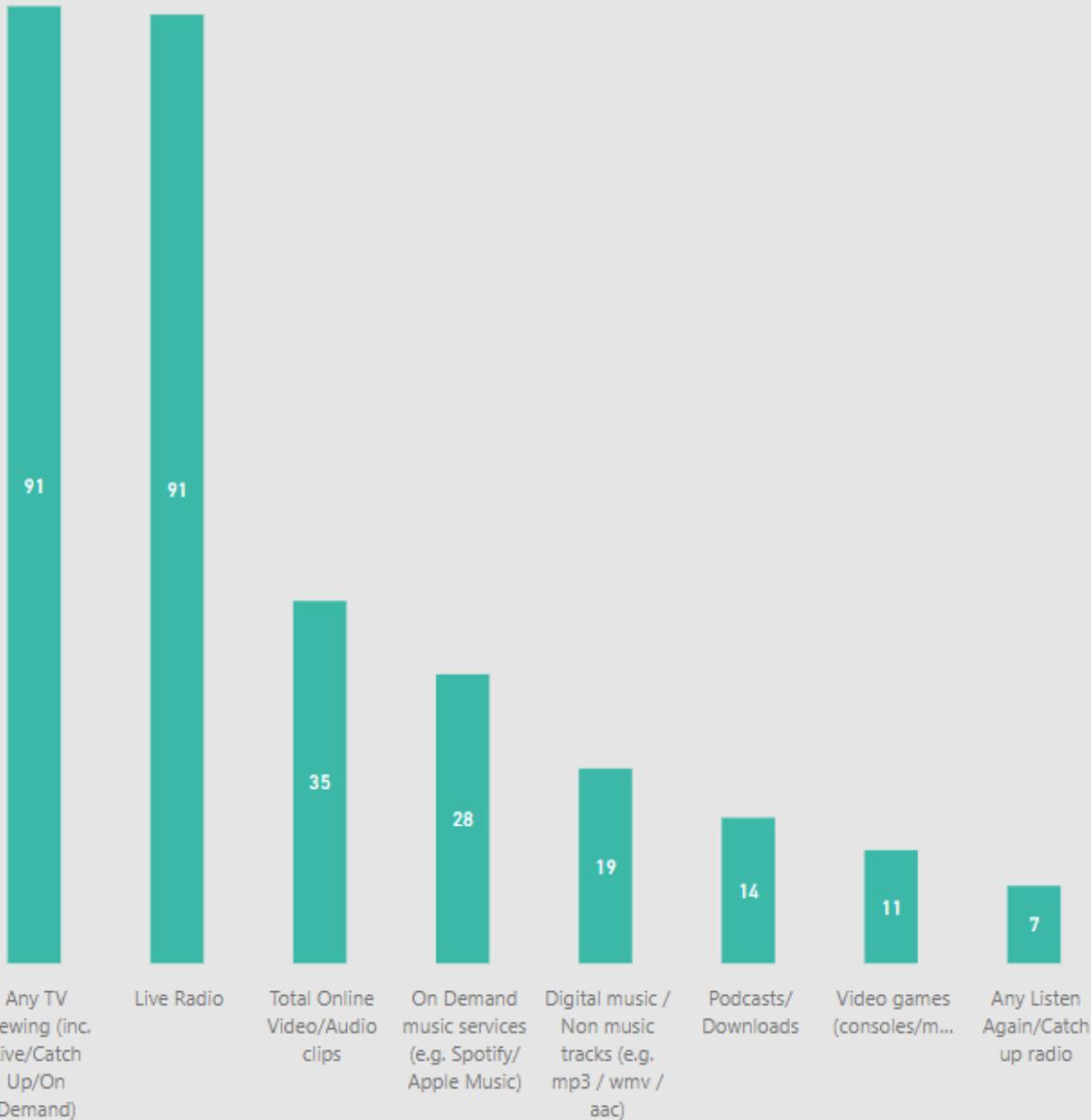
The following charts are displayed as follows;

- Audio Overview
- Live Radio
- Listen Again
- Podcasting
- On Demand Music Services
- Devices
- Wave on Wave Trends
- Time Spent

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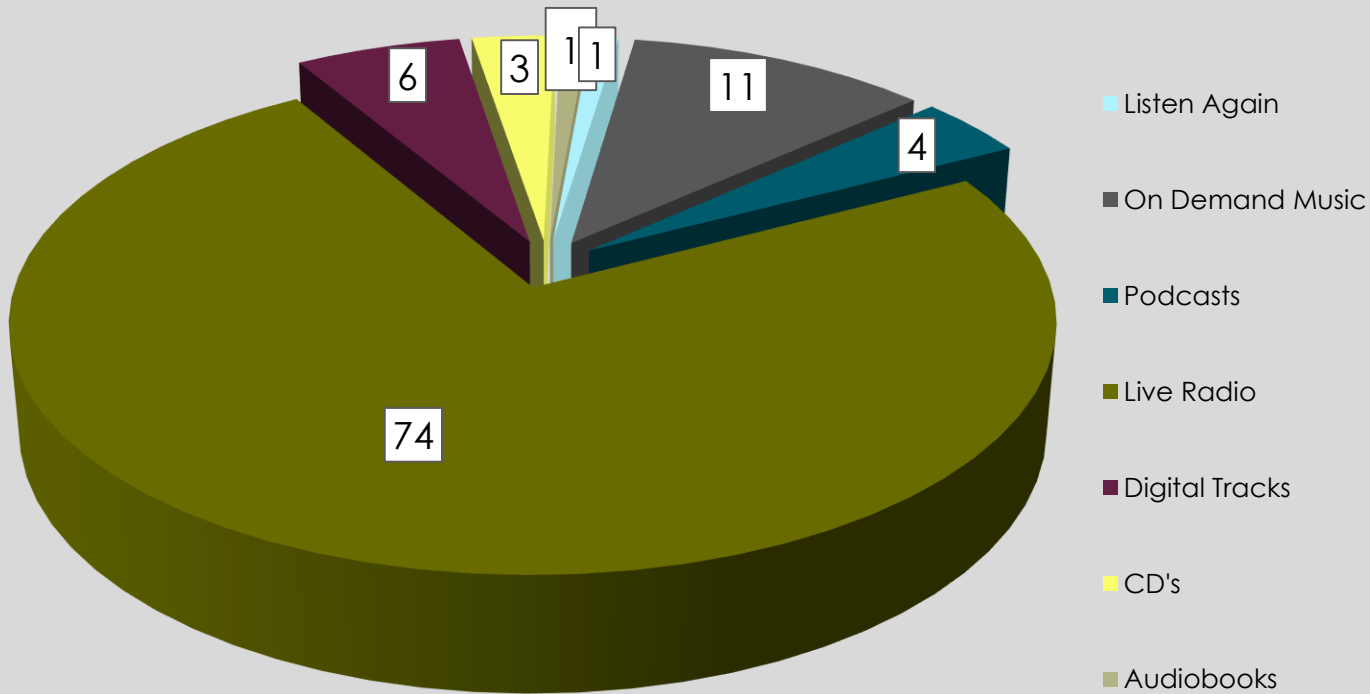
AUDIO OVERVIEW



↑ Audio Types by Weekly Reach % for Demographics (15-24, 25-34, 35-54 and 55+)

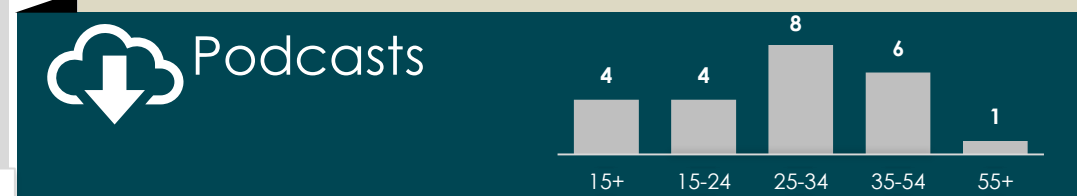
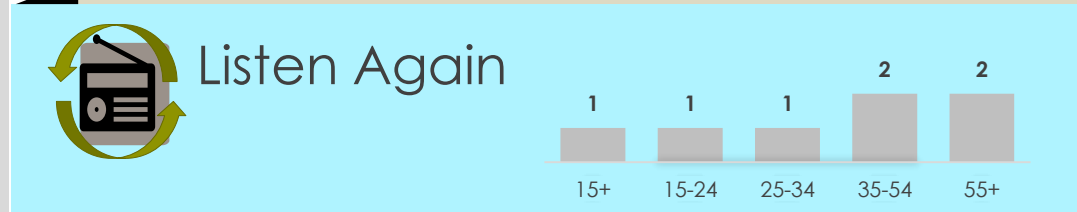
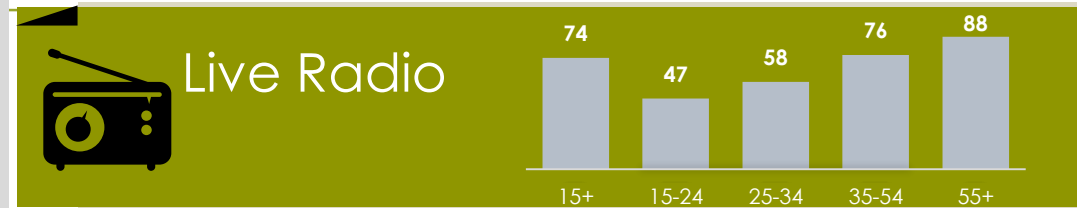
← Audio Types by Weekly Reach % for All Adults 15+

AUDIO OVERVIEW

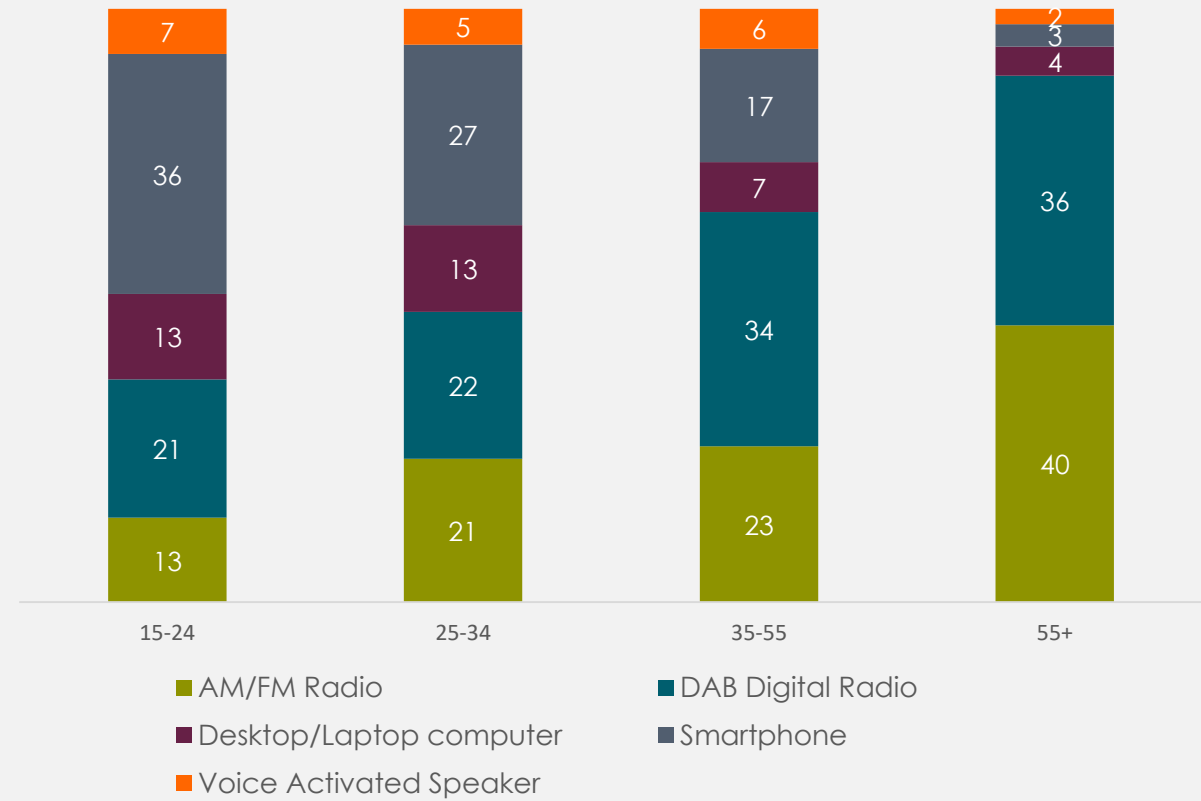
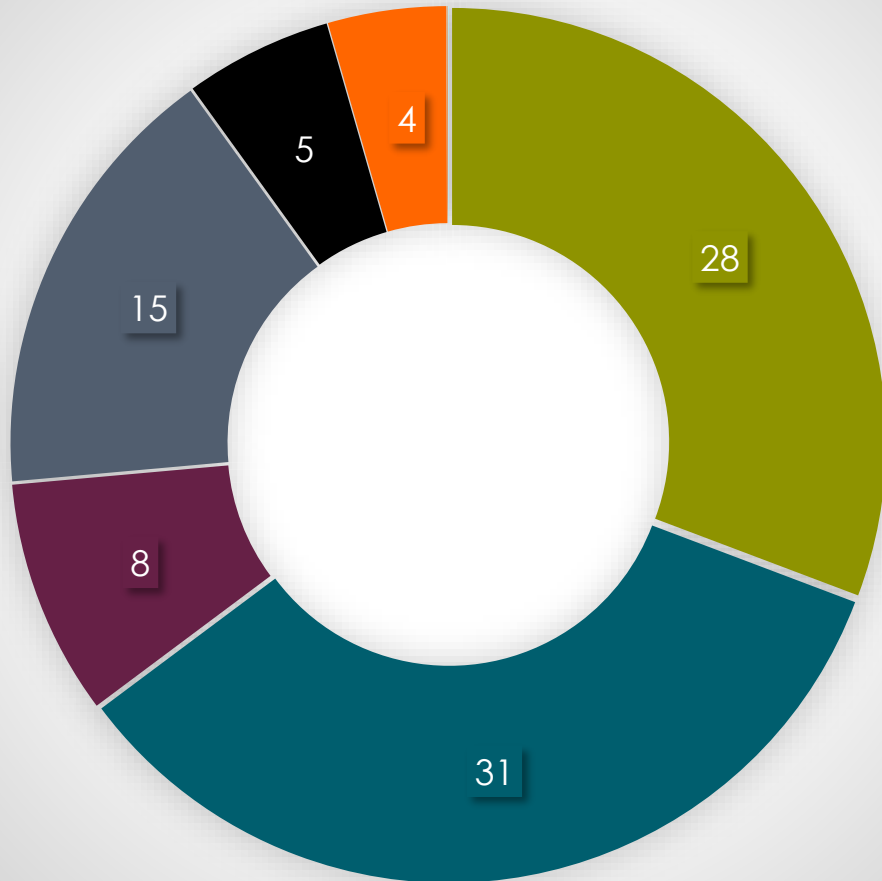


Audio (excluding visual) by Share % for All Adults 15+ 

Audio (excluding visual) by Share % for Demographics (15-24, 25-34, 35-54 and 55+) 



AUDIO OVERVIEW

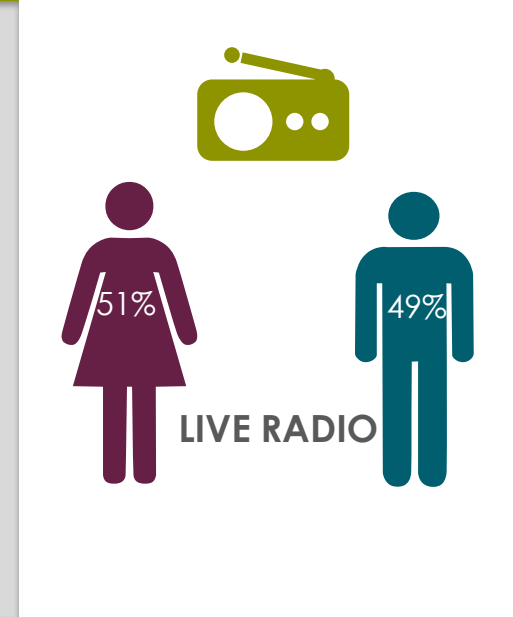
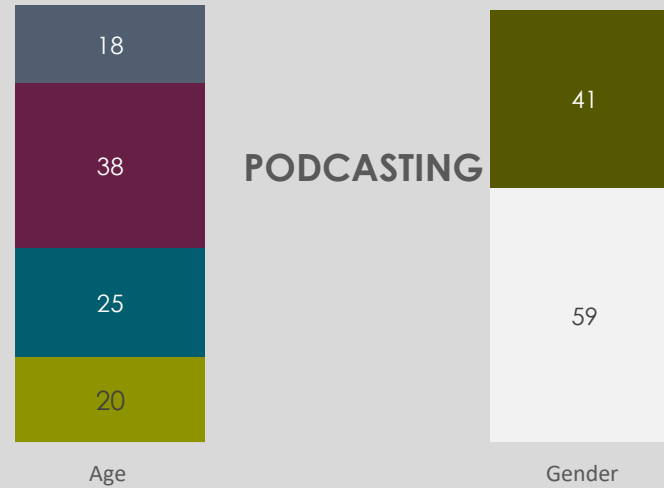
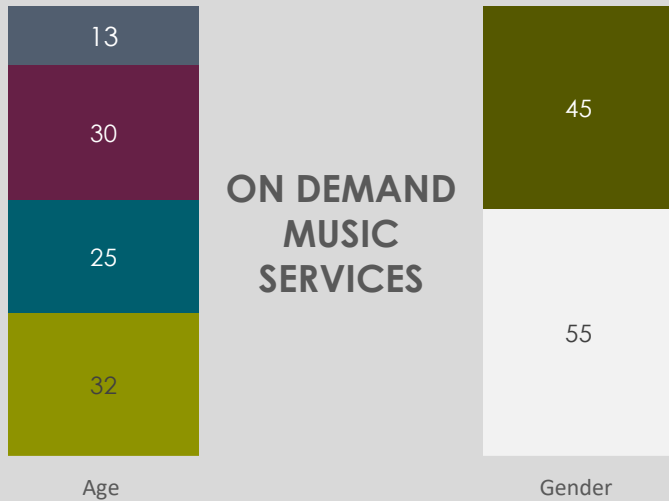


Audio (excluding visual) by Device Share % for Demographics (15-24, 25-34, 35-54 and 55+)

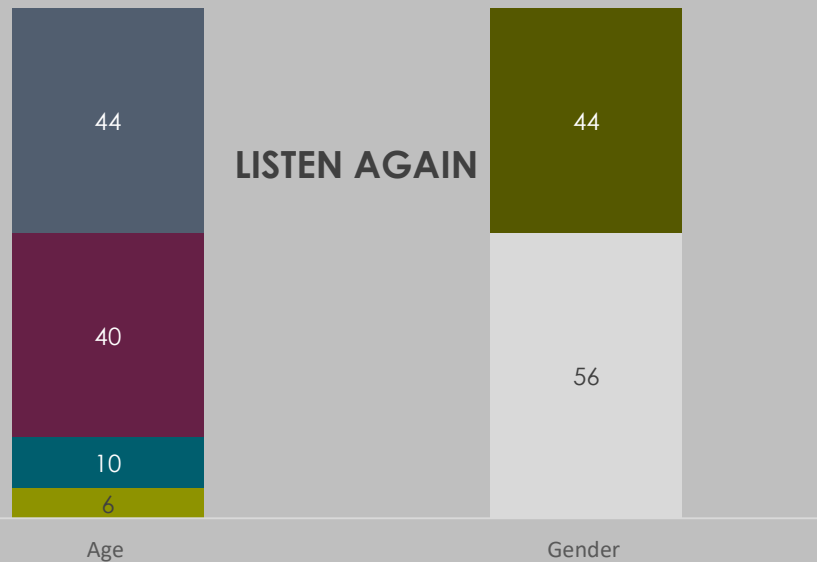
Audio (excluding visual) by Device Share % for All Adults 15+

*5% share for 'Other' devices includes TV, Tablets, CD Players etc.

AUDIO OVERVIEW



■ 15-24 ■ 25-34 ■ 35-54 ■ 55+ ■ Male ■ Female

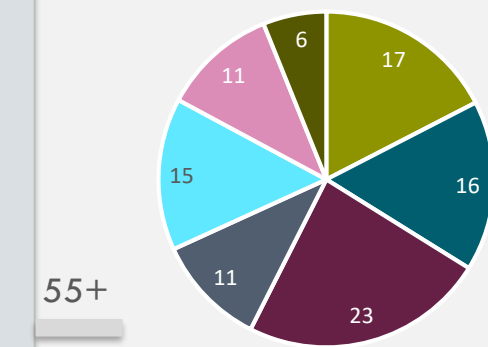
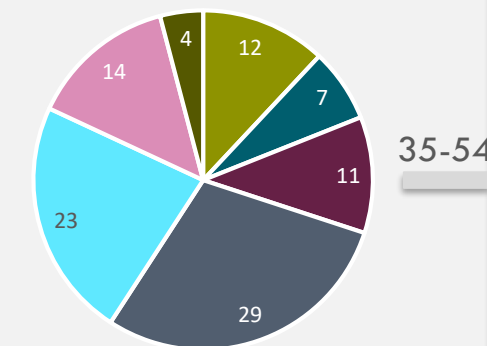
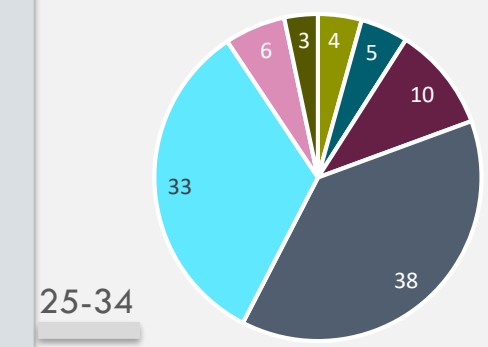
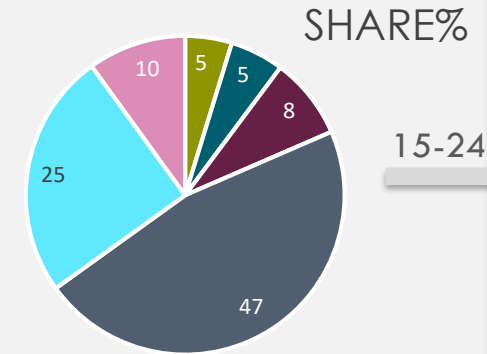
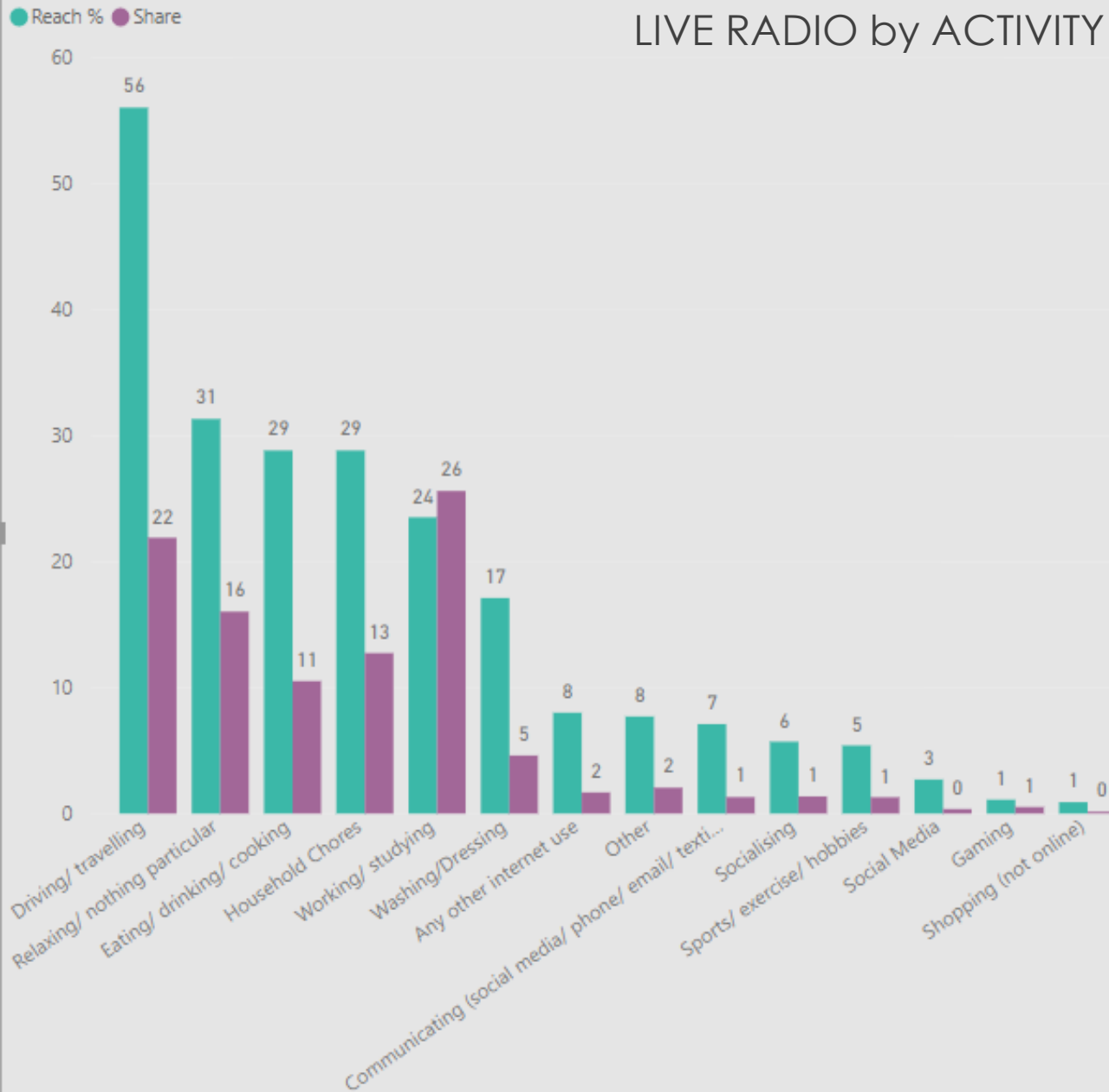


A Quarter of all Podcasters are aged between 25-34.

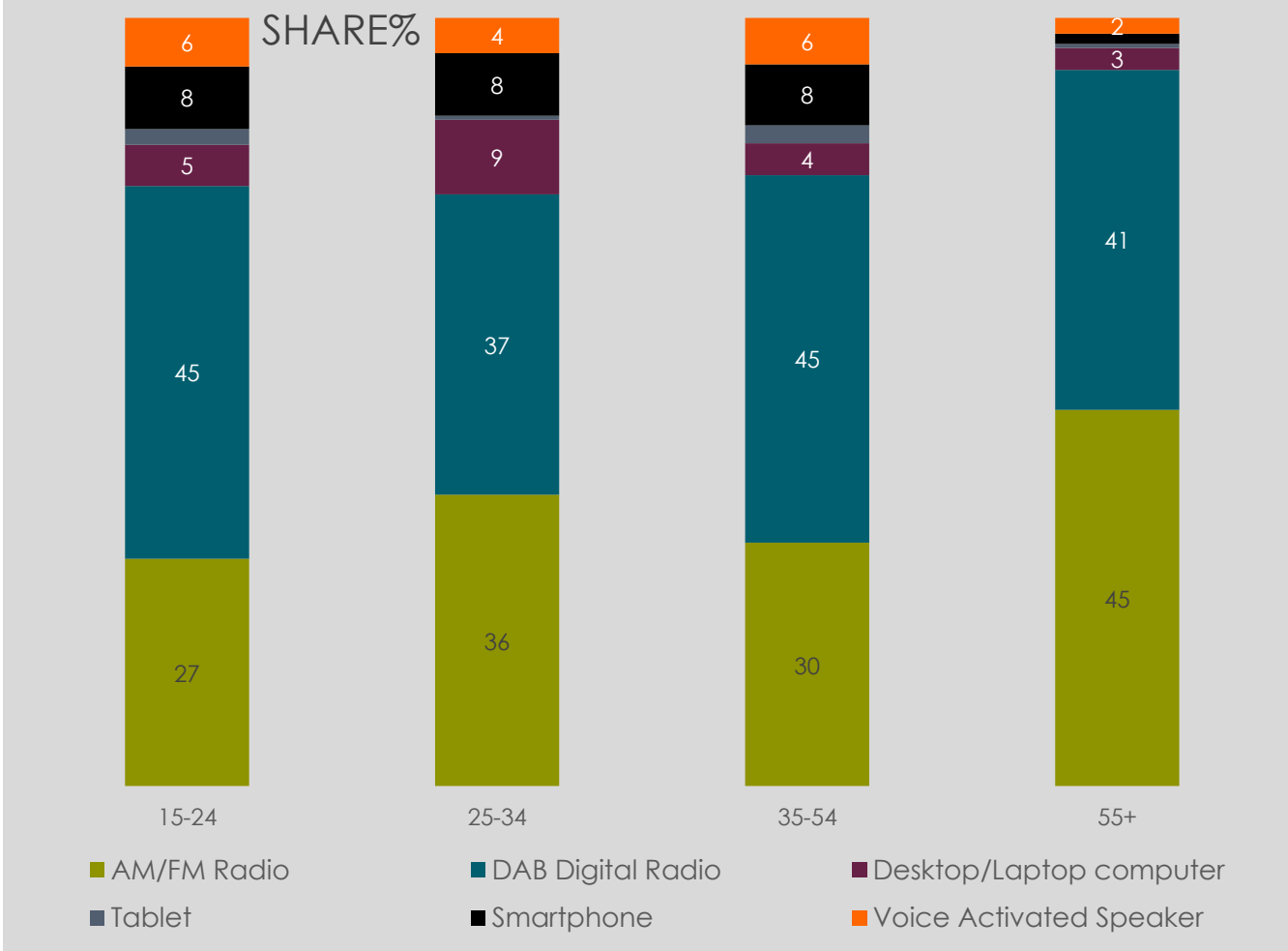
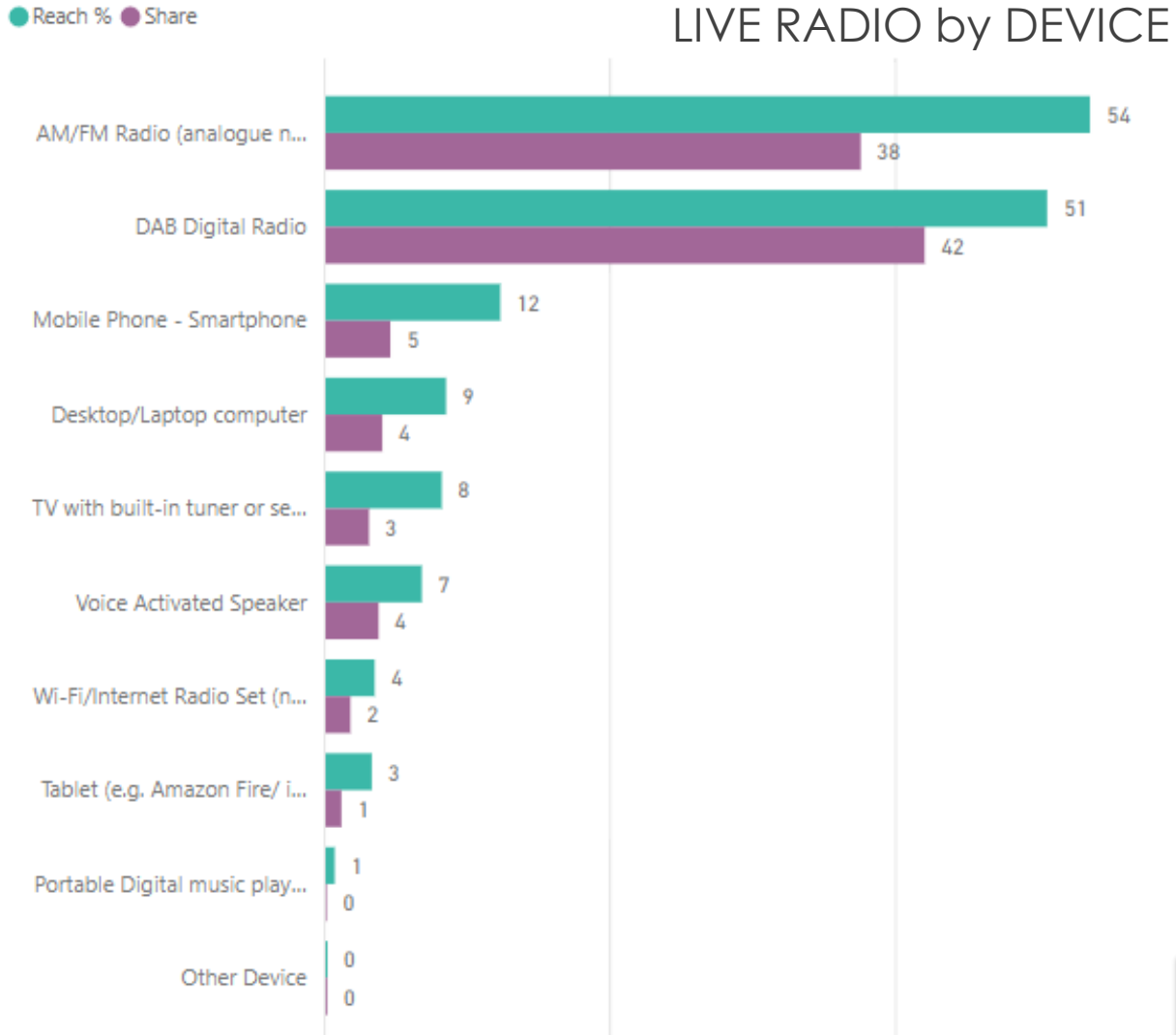
Listen Again or Catch up radio is favoured in the older demographics.

Almost a third of all On Demand Music (including Spotify, Apple Music, Amazon Prime Music) users are aged between 15-24.

Podcasting, Listen Again and OMS slightly tip toward Males but Females listen to more 'Live Radio'



- Household Chores
- Eating/ drinking/ cooking
- Relaxing/ nothing particular
- Working/ studying
- Driving/ travelling
- Other
- Washing/Dressing



Whilst reach% of AM/FM Radios remains high (54%), the share has decreased against DAB/DAB+ radios (38% v 42%)

4% of Live Radio listening hours for all adults is now via Voice Activated speakers, this share is higher for 15-24s and 35-45s.

LIVE RADIO via LOCATION and WHO WITH

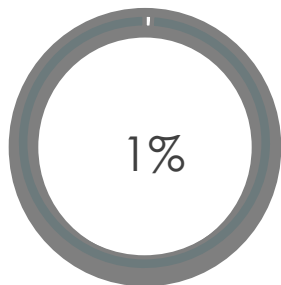


Home

Car/Van/Lorry

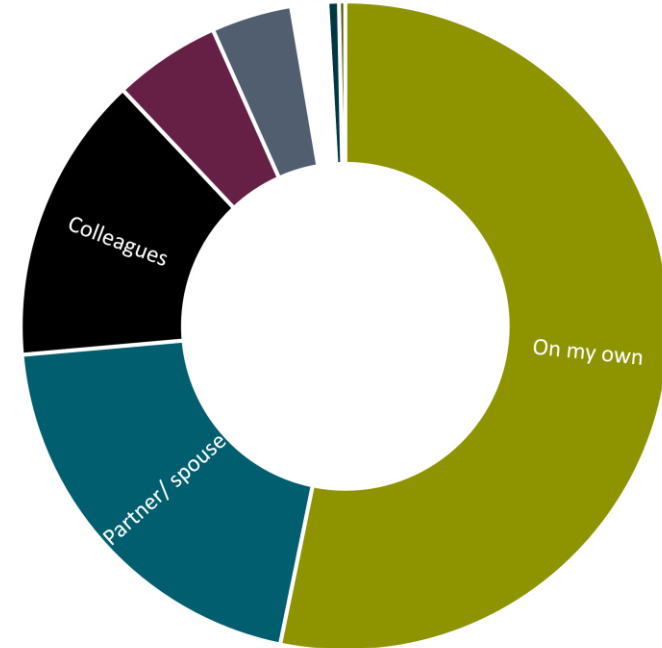


Work/Place of Study



Public Transport/Walking

*1% elsewhere

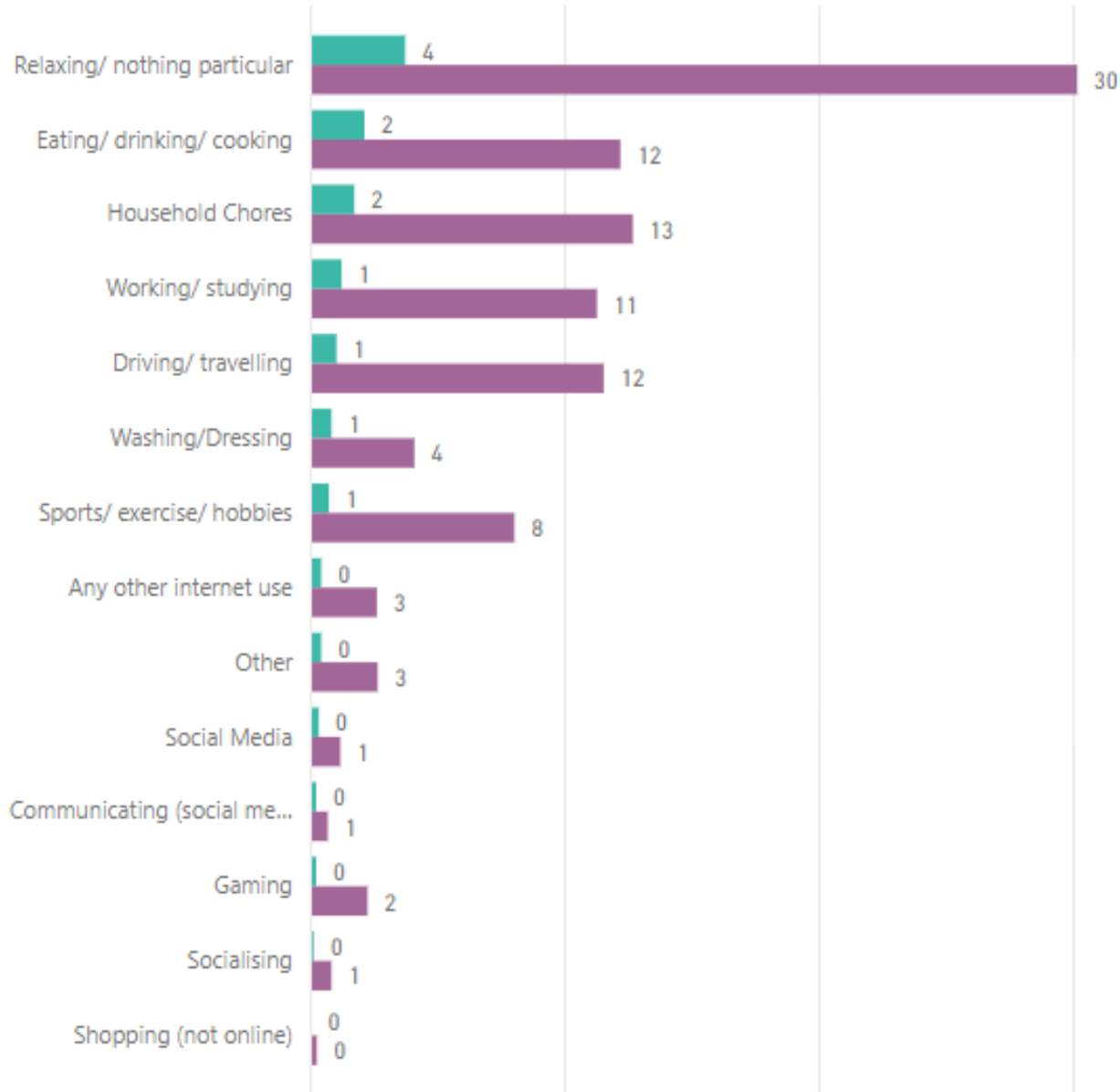


Over half of live radio listening is done alone, this is consistent through the age demographics.

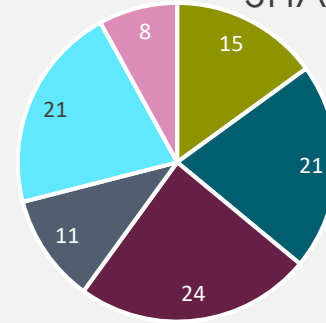
In 'home' dominates live radio listening hours with a share of 59%, in vehicle 22%, at work or place of study 17%

● Reach % ● Share

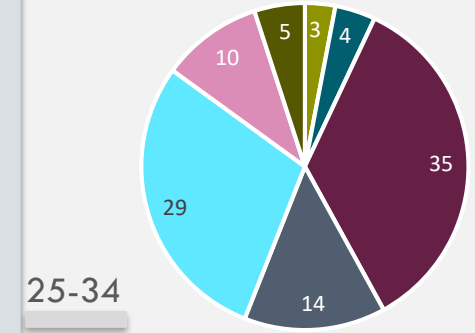
LISTEN AGAIN by ACTIVITY



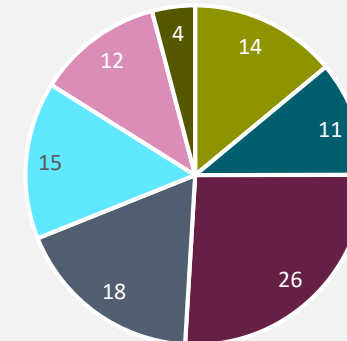
SHARE%



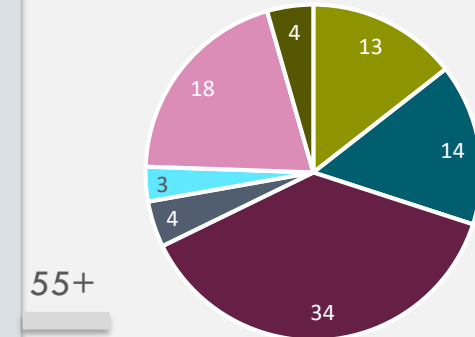
15-24



25-34



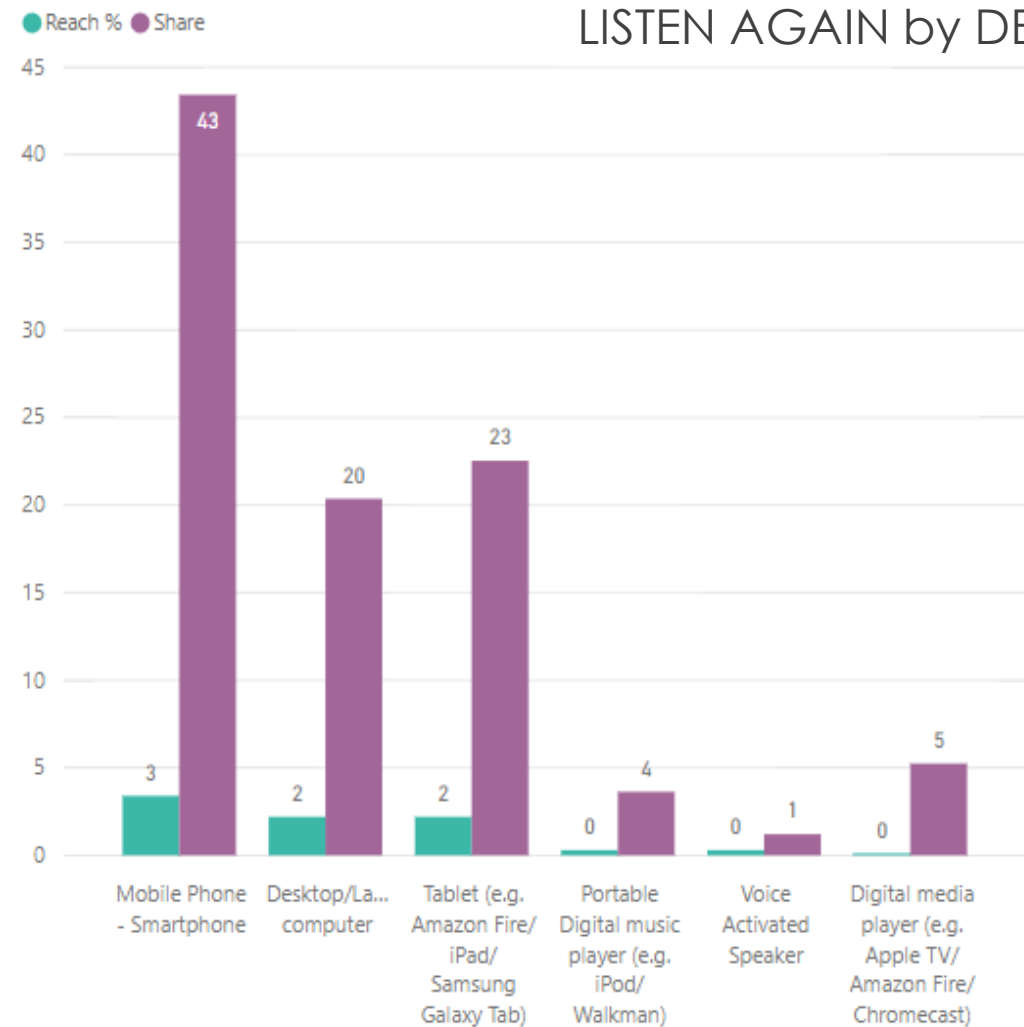
35-54



55+

- Household Chores
- Eating/ drinking/ cooking
- Relaxing/ nothing particular
- Working/ studying
- Driving/ travelling
- Other
- Washing/Dressing

LISTEN AGAIN by DEVICE



Smartphones are the most frequently used device to go back and listen to a radio programme at a later date.

4.2 Million

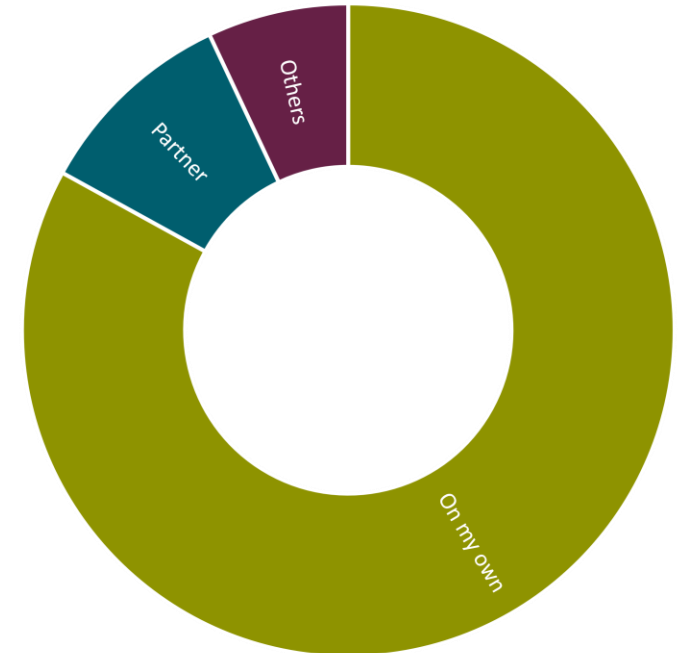
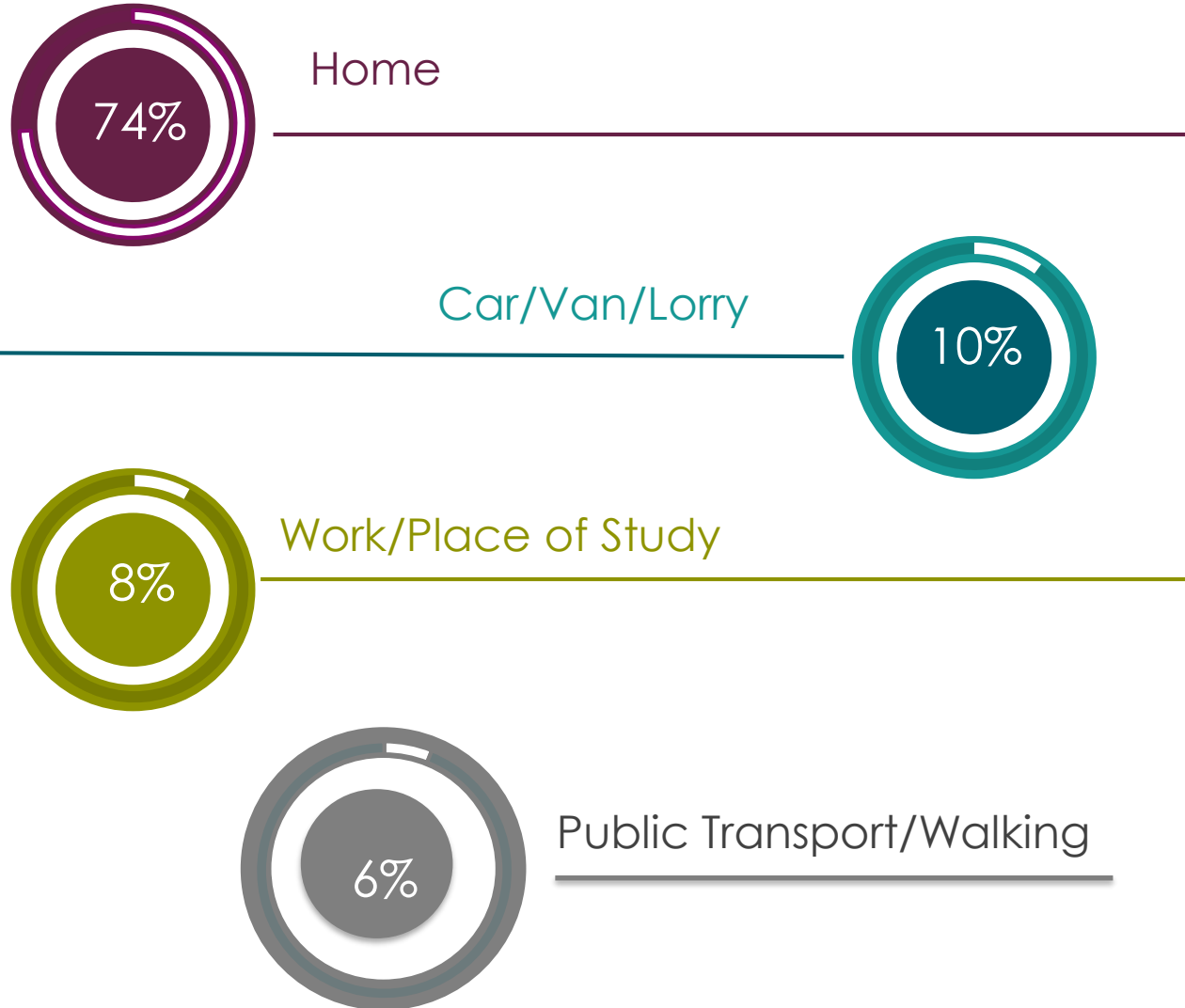
'Listen Again' users claim to listen to more Live Radio since they started using Catch Up services.

1.9 million hours of Catch Up Radio is listened to through Headphones each week.



1.9 million

LISTEN AGAIN via LOCATION and WHO WITH



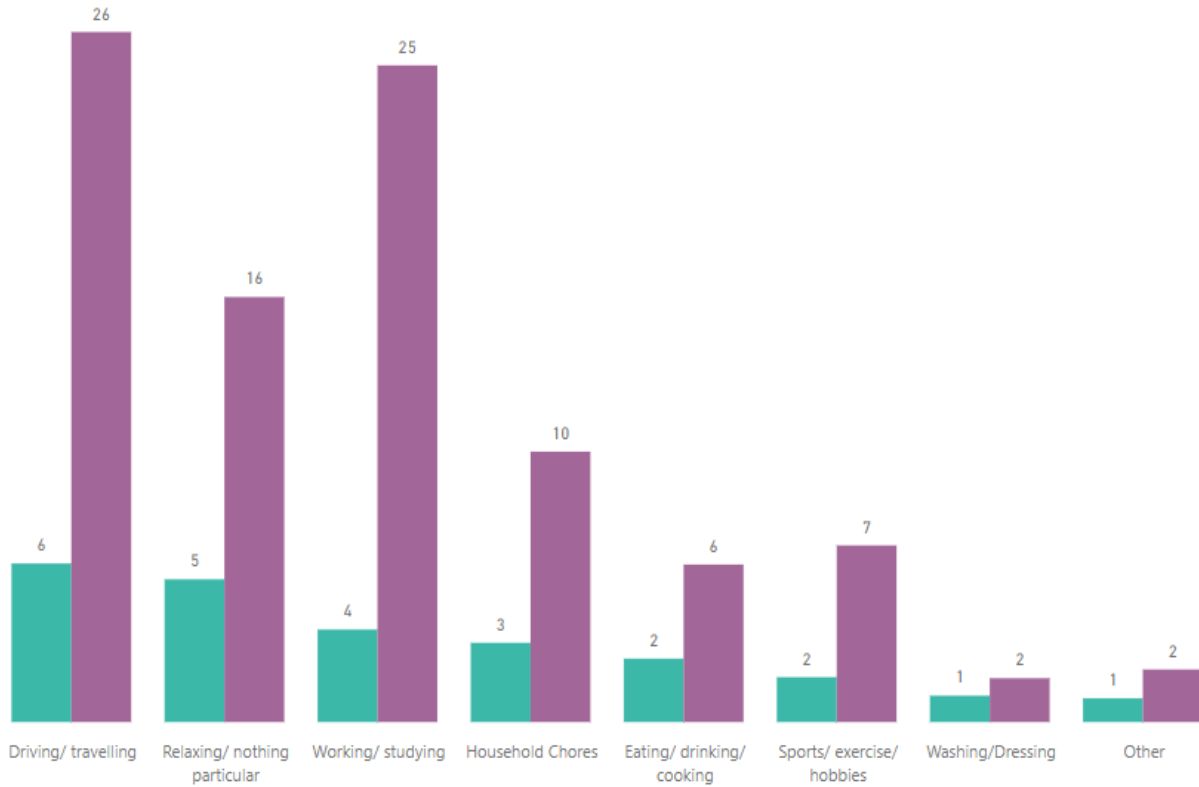
83% of Catch Up or Listen Again radio hours are spent listening on a person's own, only 10% with a partner or spouse and less frequently with others.

Almost three quarters of Catch Up radio listening is done at Home.

*2% Elsewhere

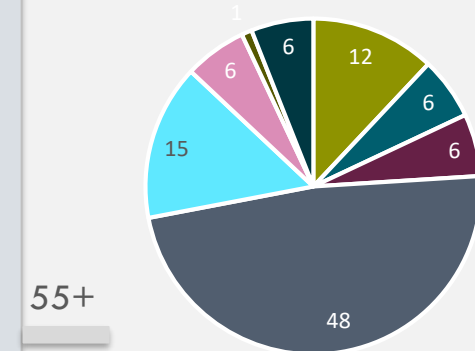
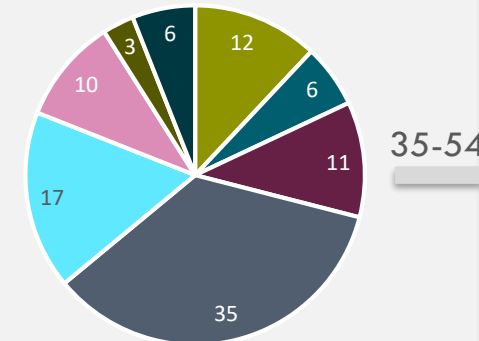
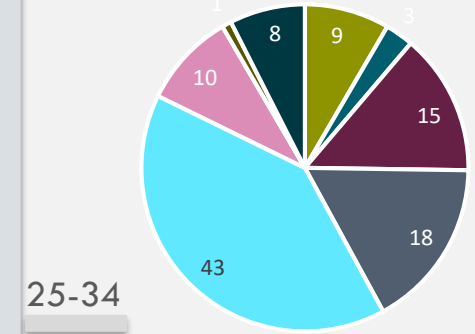
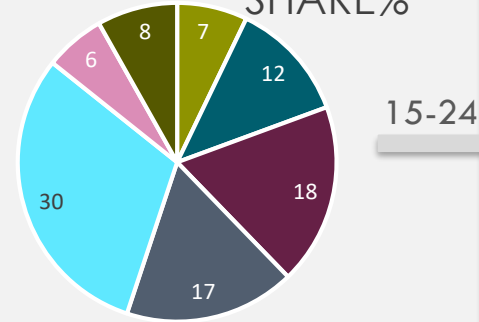
● Reach % ● Share

PODCAST by Activity



72% of Podcast listeners listen to the whole episode and 60% listen to mostly all of the episodes they download.

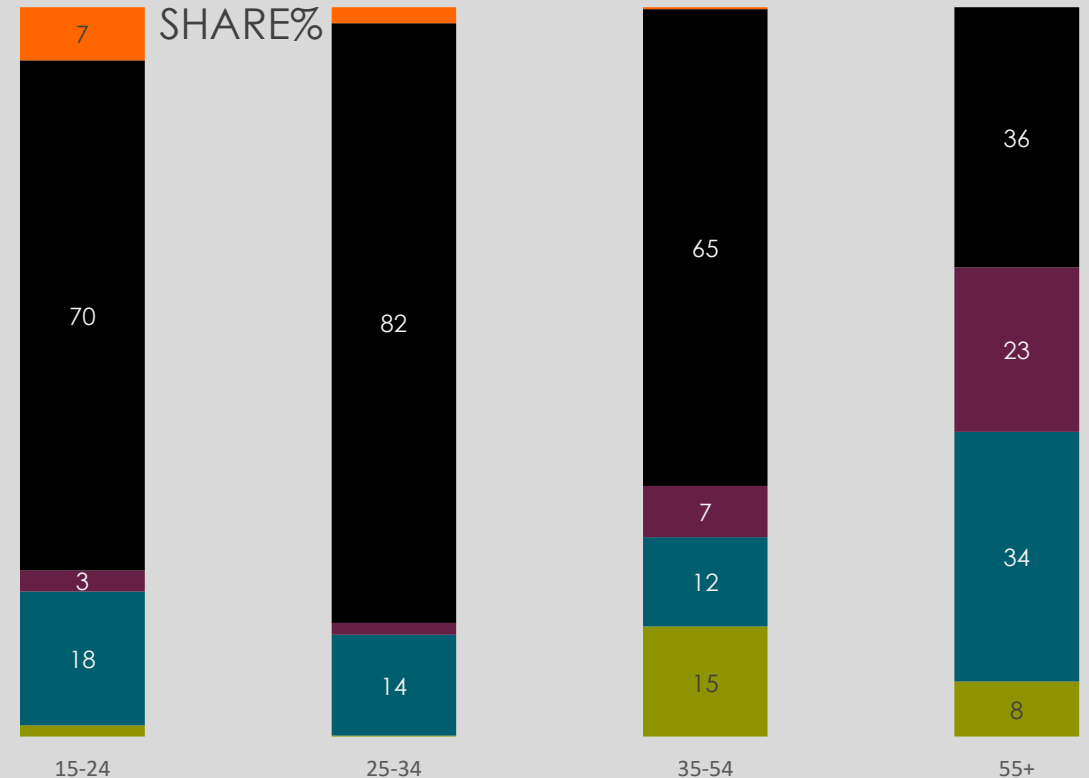
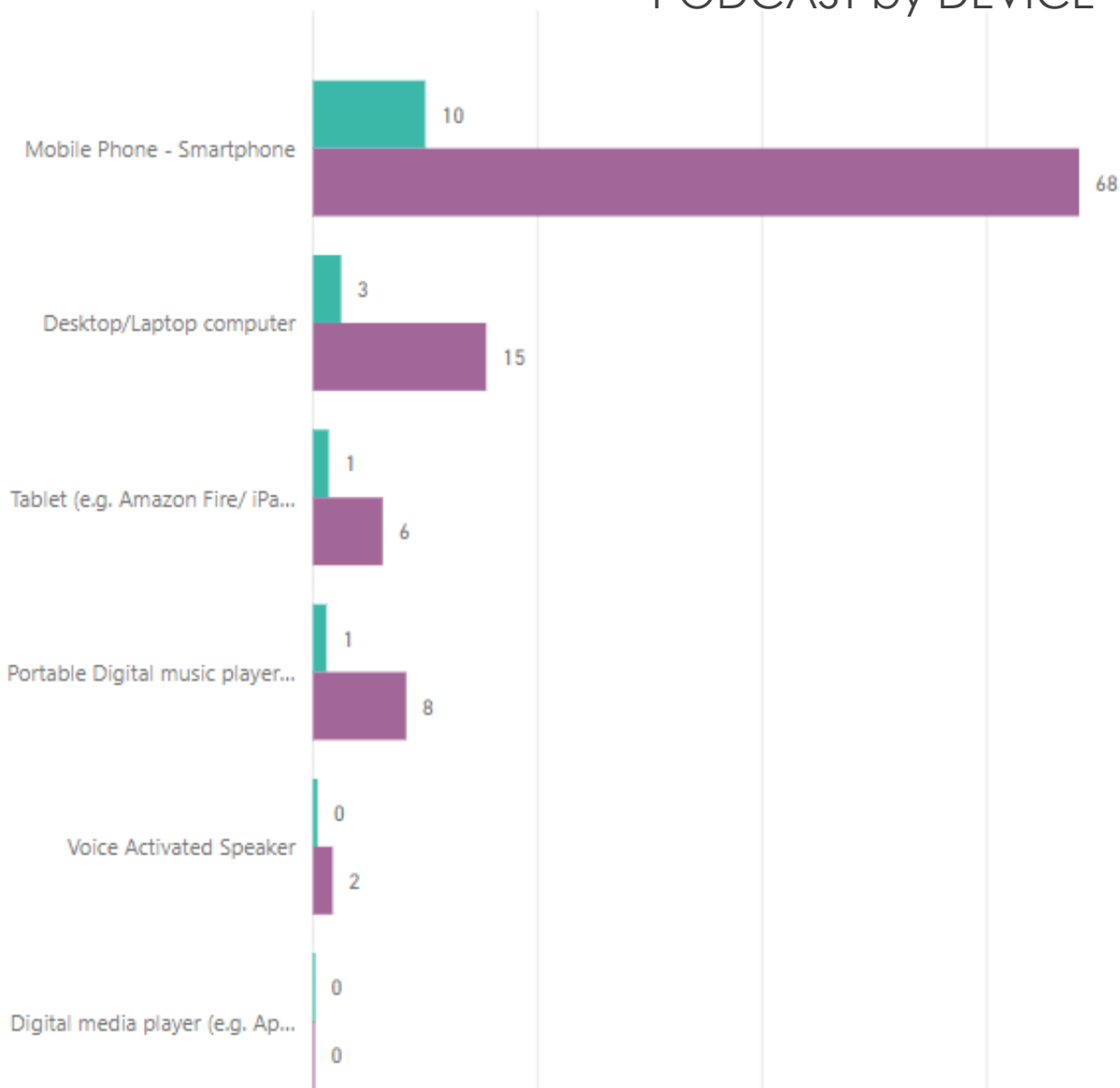
SHARE%



- Household Chores
- Eating/ drinking/ cooking
- Relaxing/ nothing particular
- Working/ studying
- Driving/ travelling
- Other
- Washing/Dressing

● Reach % ● Share

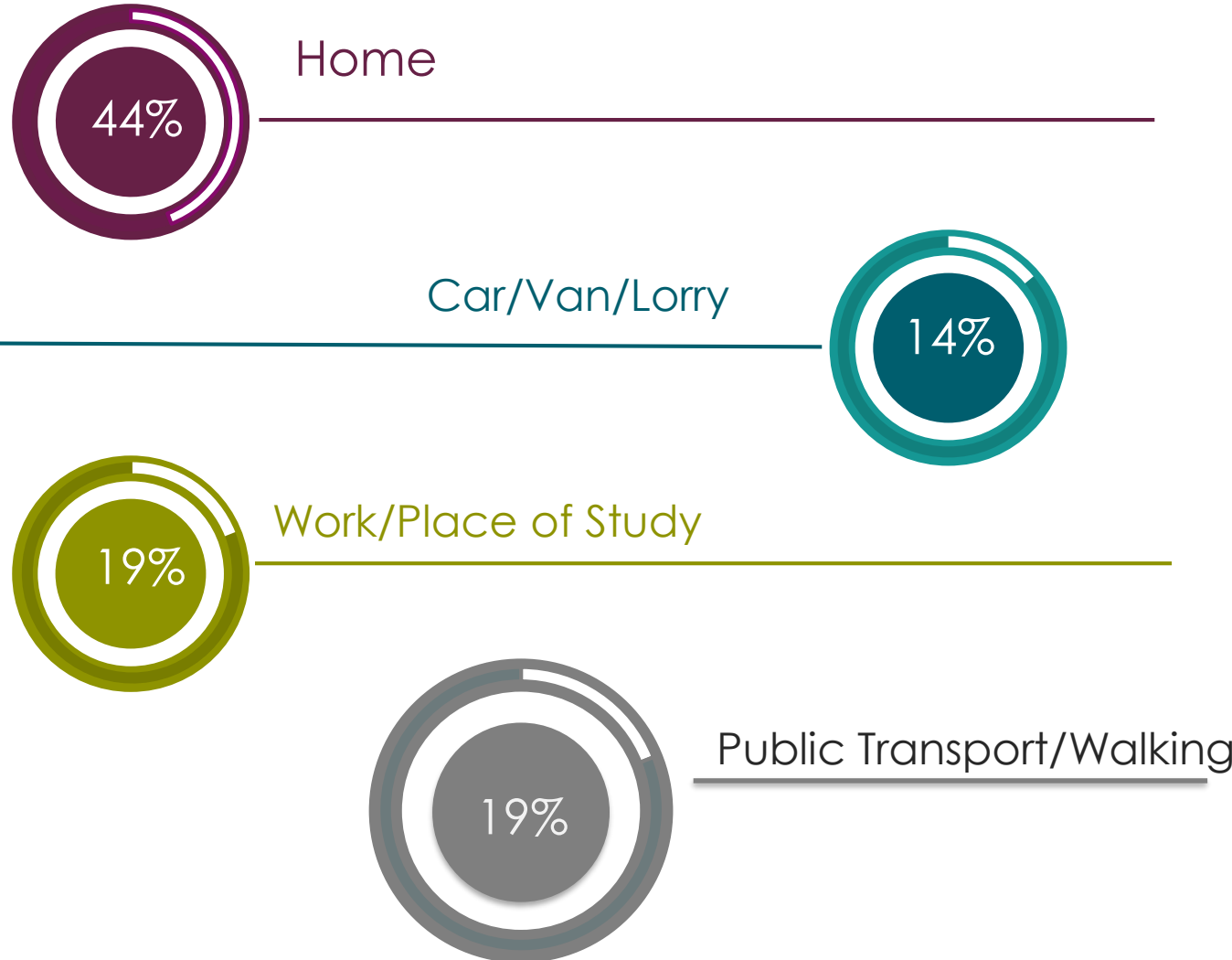
PODCAST by DEVICE



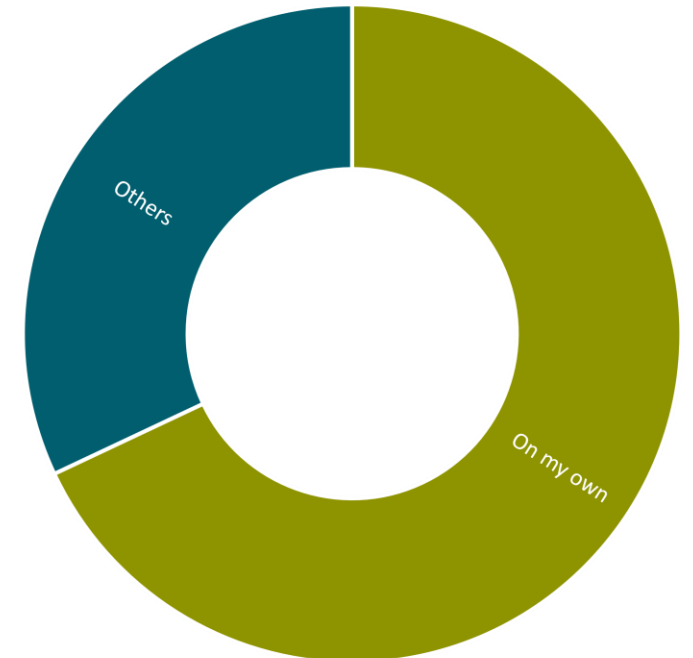
- Voice Activated Speaker
- Mobile Phone - Smartphone
- Tablet (e.g. Amazon Fire/ iPad/ Samsung Galaxy Tab)
- Desktop/Laptop computer
- Portable Digital music player (e.g. iPod/ Walkman)

Smartphones are the preferred device for listening to Podcasts with a share of 68% for All adults 15+, but higher for younger demographics (70% for 15-24s and 82% for 25-34s)

PODCASTING via LOCATION and WHO WITH



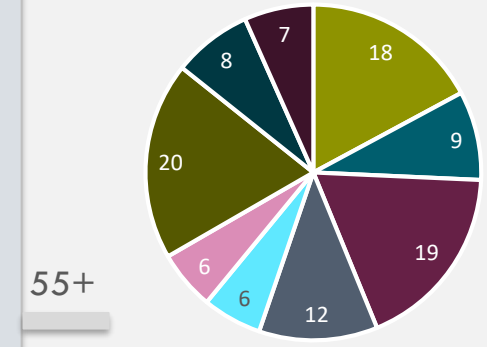
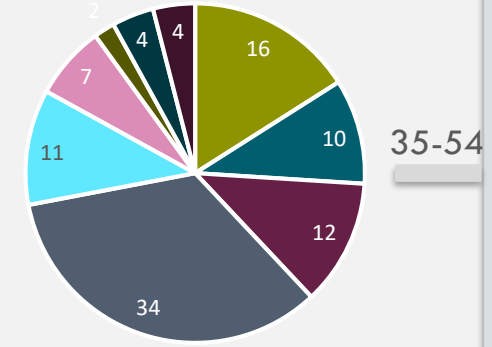
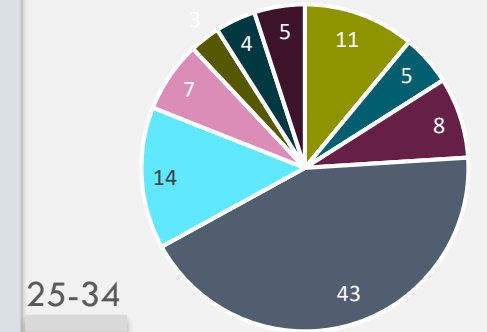
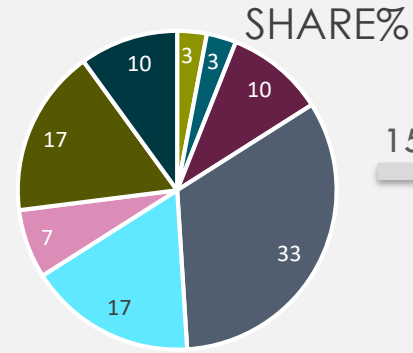
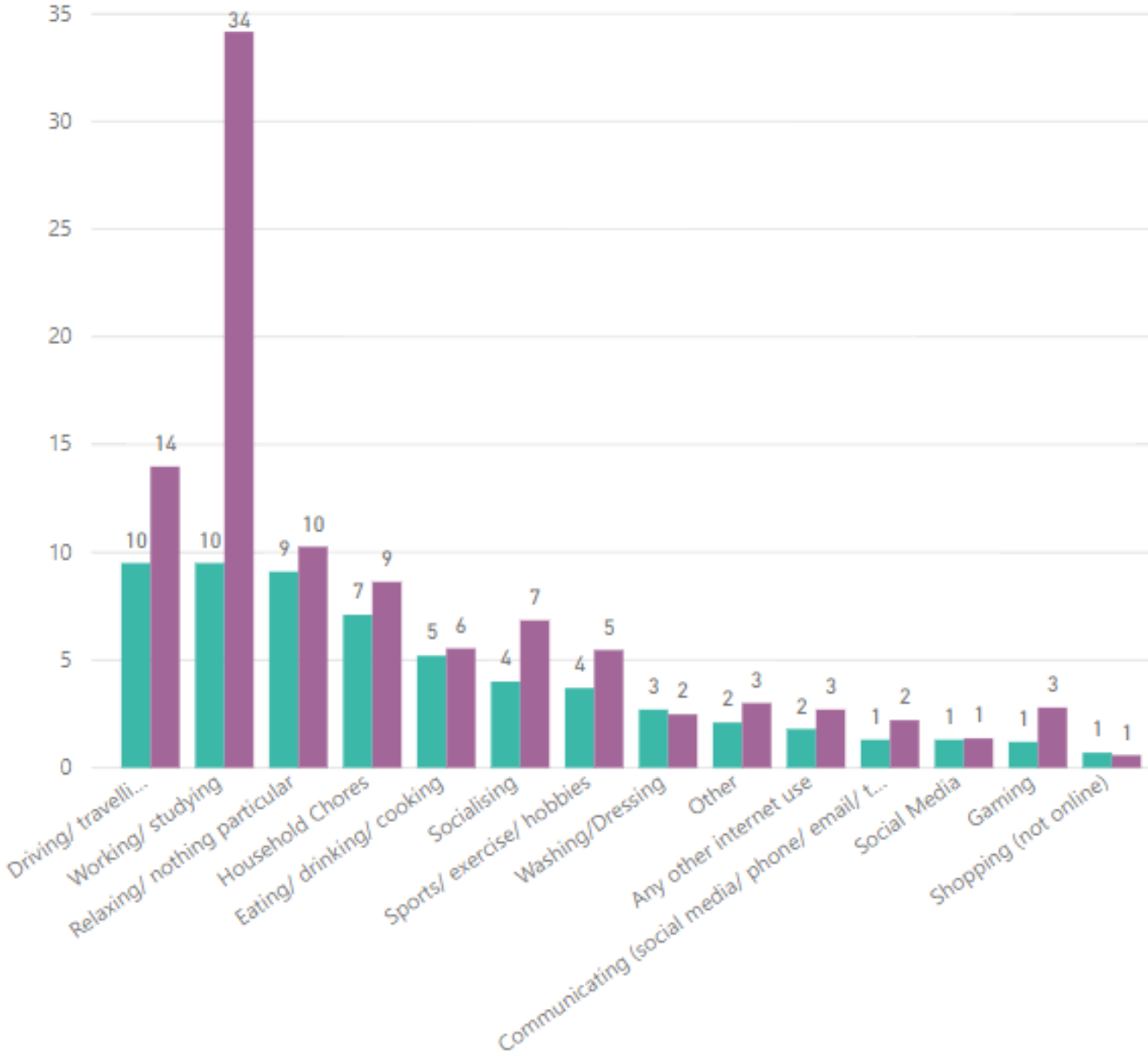
4% Elsewhere



Podcasting is almost always a solo activity, with a share of 92%

● Reach % ● Share

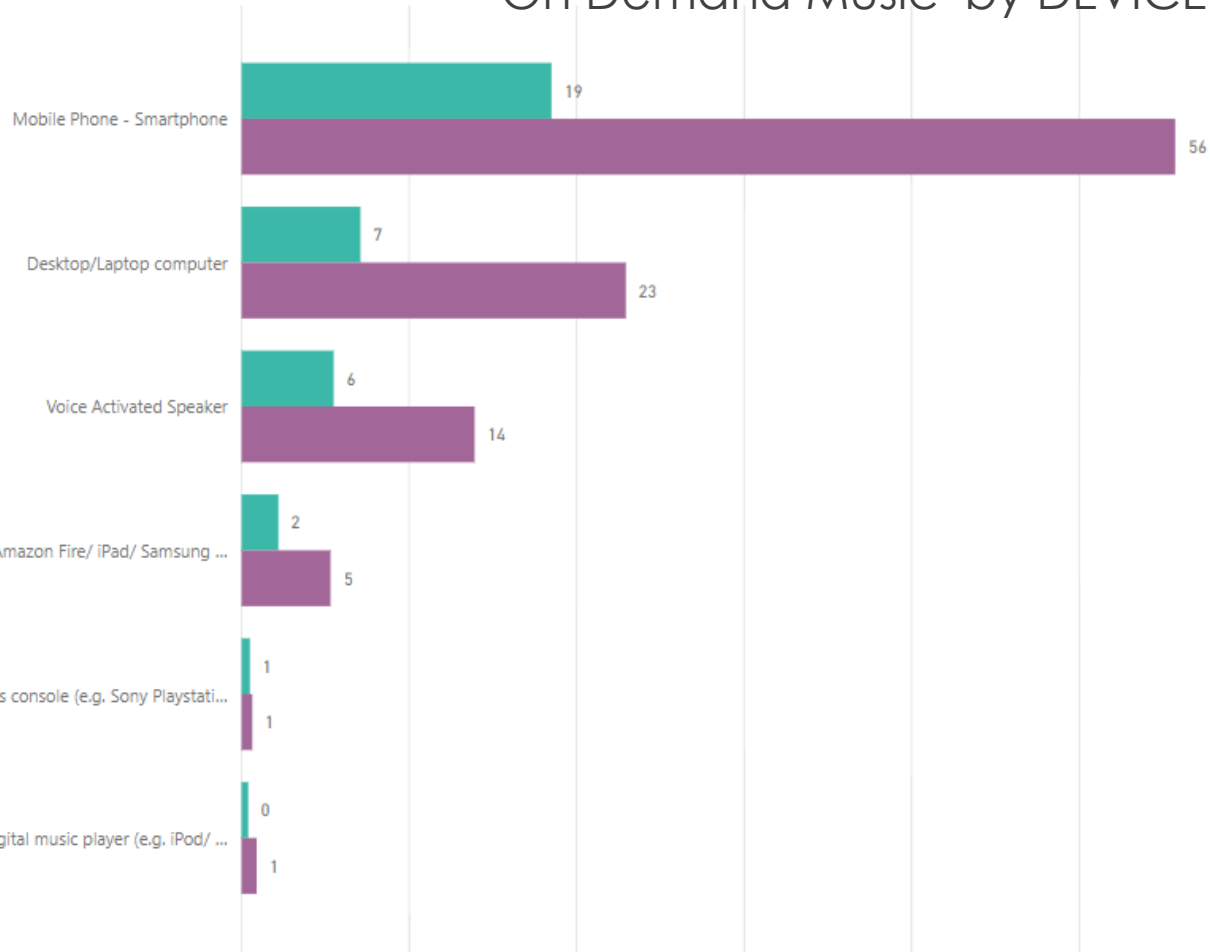
On Demand Music by Activity



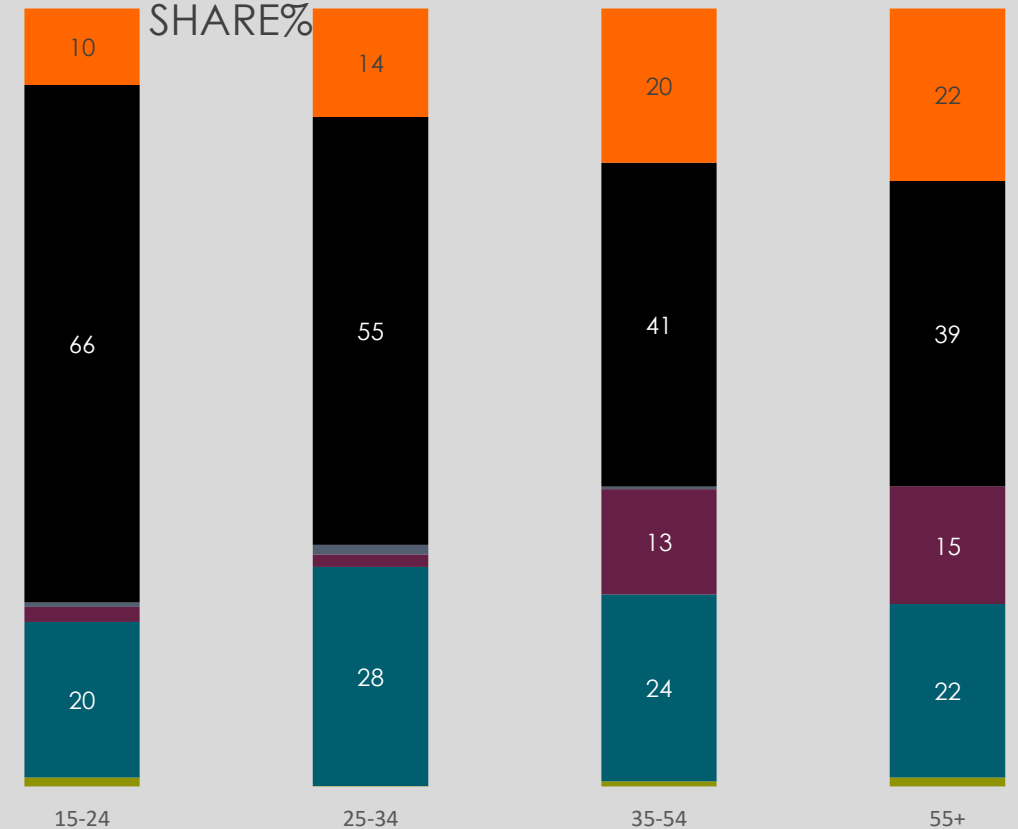
- Household Chores
- Eating/ drinking/ cooking
- Relaxing/ nothing particular
- Working/ studying
- Driving/ travelling
- Other
- Washing/Dressing

● Reach % ● Share

On Demand Music by DEVICE



SHARE%



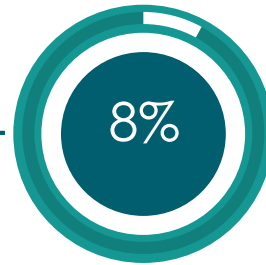
- Voice Activated Speaker
- Mobile Phone - Smartphone
- Home games console (e.g. Sony Playstation/ Microsoft Xbox)
- Tablet (e.g. Amazon Fire/ iPad/ Samsung Galaxy Tab)
- Desktop/Laptop computer
- Portable Digital music player (e.g. iPod/ Walkman)

On Demand Music by LOCATION and WHO WITH

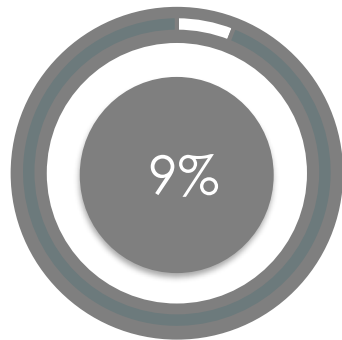


Home

Car/Van/Lorry

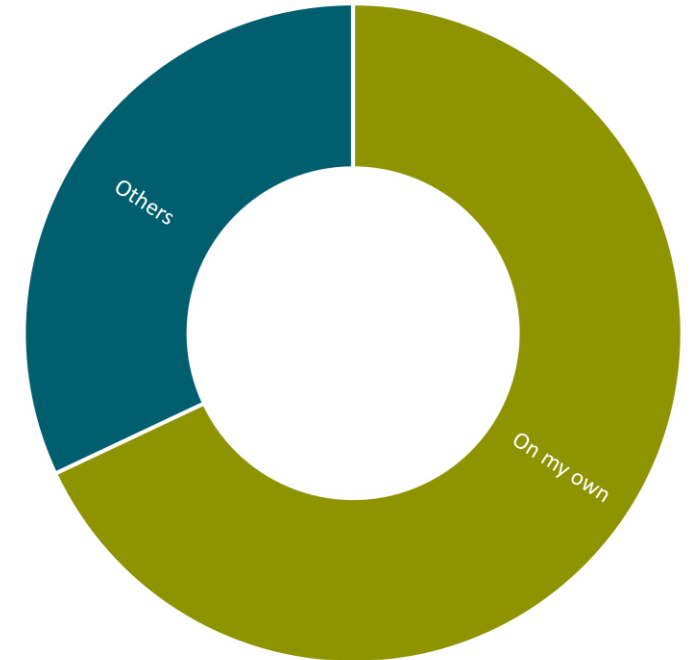


Work/Place of Study



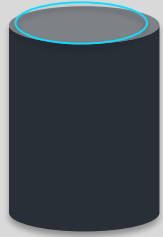
Public Transport/Walking

8% Elsewhere

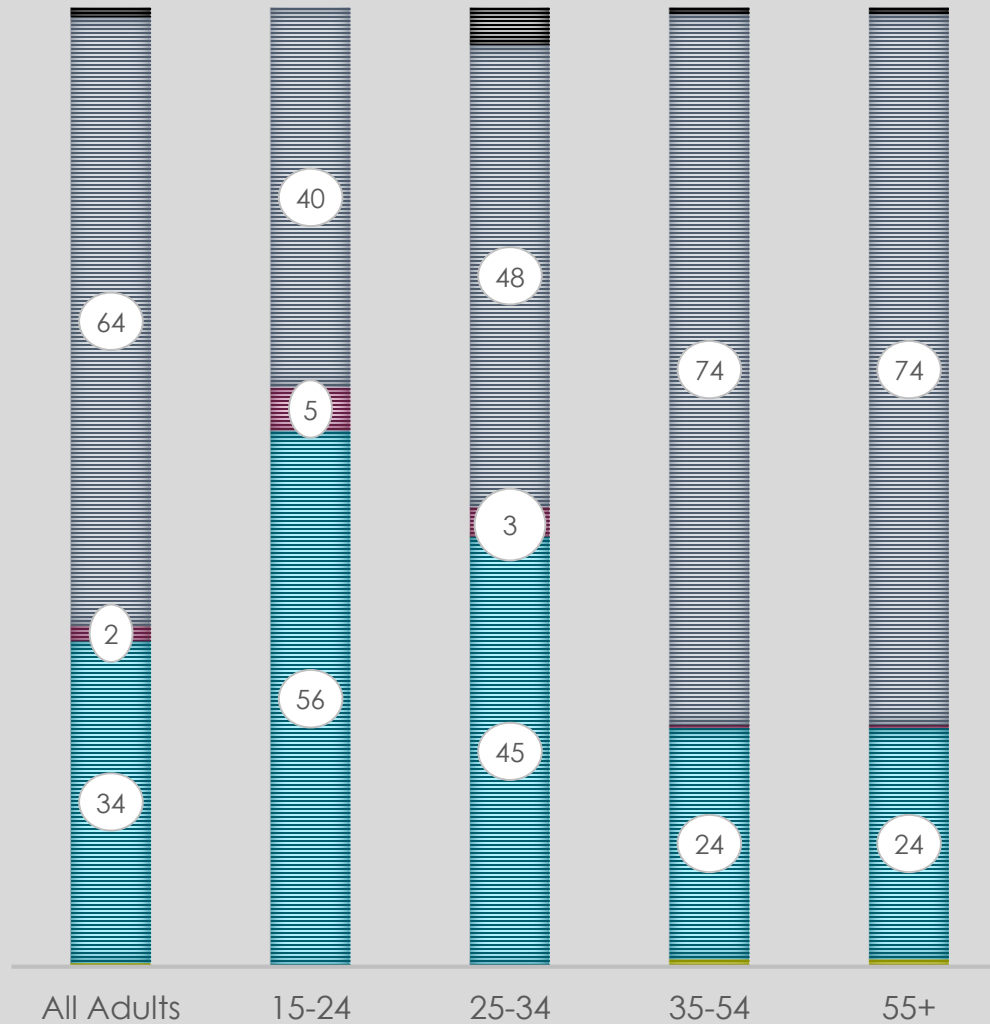


Listening to music services on demand is more sociable than other audio types such as Podcasting or Catch up Radio with almost a third (32%) of listening hours spent with other people.

VOICE ACTIVATED SPEAKERS



- Audiobooks
- Live Radio
- Podcasts/ Downloads
- On Demand music services (e.g. Spotify/ Apple Music)
- Any Listen Again/Catch up radio



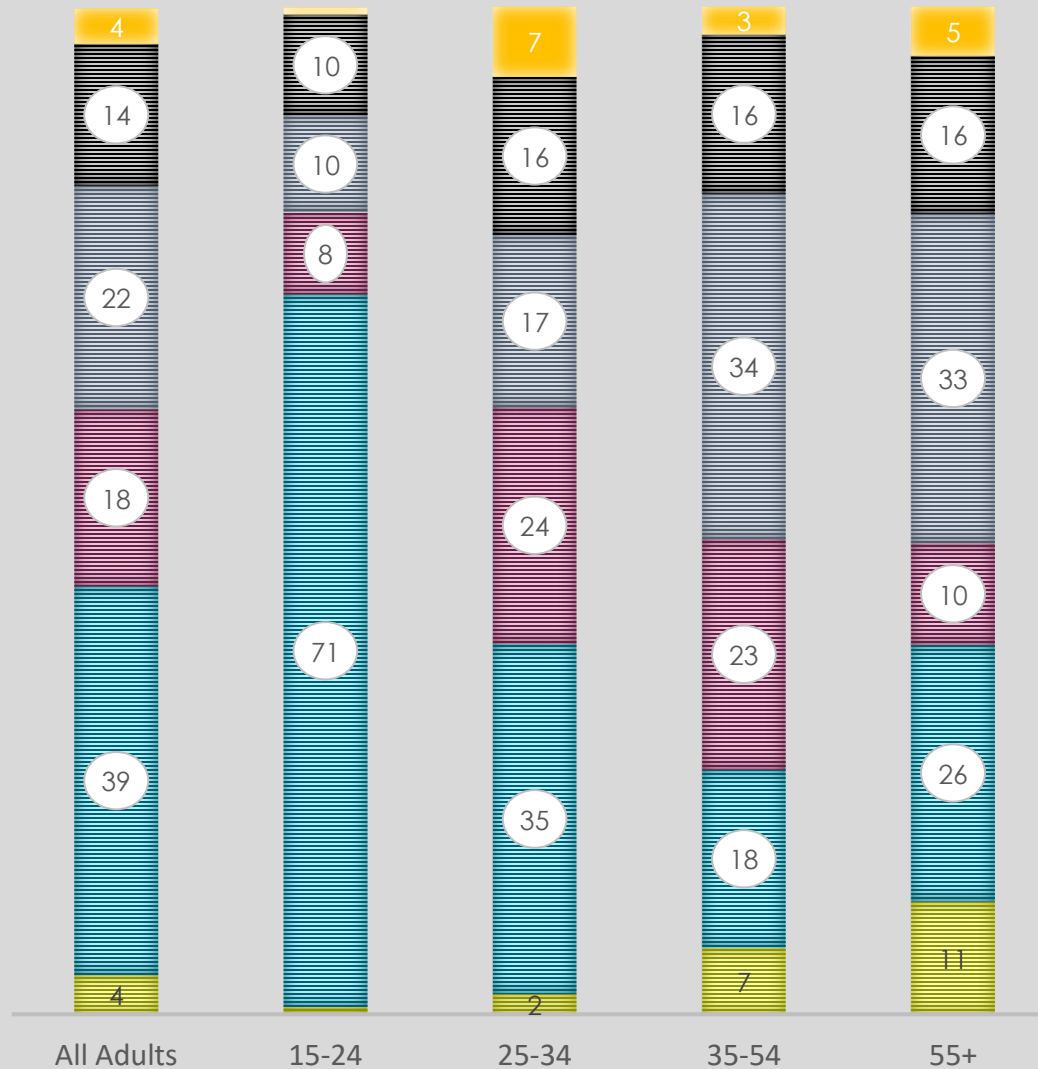
64% of all listening done on a Voice Activated Speaker such as an Amazon Echo, Google Home or Sonos 1 is to Live Radio. On Demand Music has a share of 34%, Podcasting 2% and Audiobooks 1%.

Radio listening dominates the usage of Voice Activated or Smart speakers except for 15-24s where they listen to more On Demand Music.

SMARTPHONE



- Audiobooks
- Digital music / Non music tracks (e.g. mp3 / wmv / aac)
- Live Radio
- Podcasts/ Downloads
- On Demand music services (e.g. Spotify/ Apple Music)
- Any Listen Again/Catch up radio



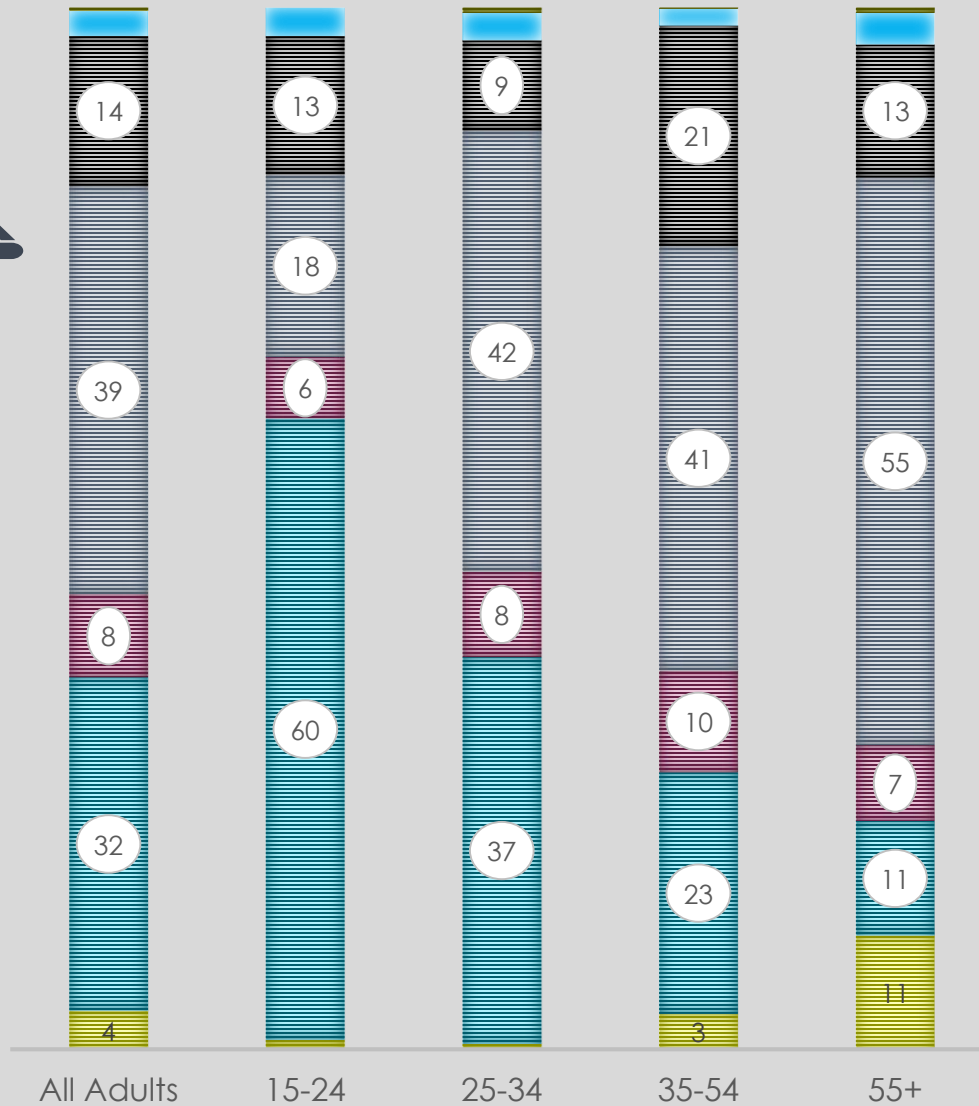
For All Adults the time spent listening to audio types via a Smartphone is quite evenly distributed. On Demand Music has the highest share with 39% of the listening, followed by Live Radio 22%, Podcasts 18%, Digital Tracks (owned music) 14%, Catch Up Radio and Audiobooks 4%.

This varies by Age Group, in the older demographics Live Radio is the favoured choice but younger people are using their phones more to listen to On Demand streaming services.

LAPTOPS/DESKTOPS



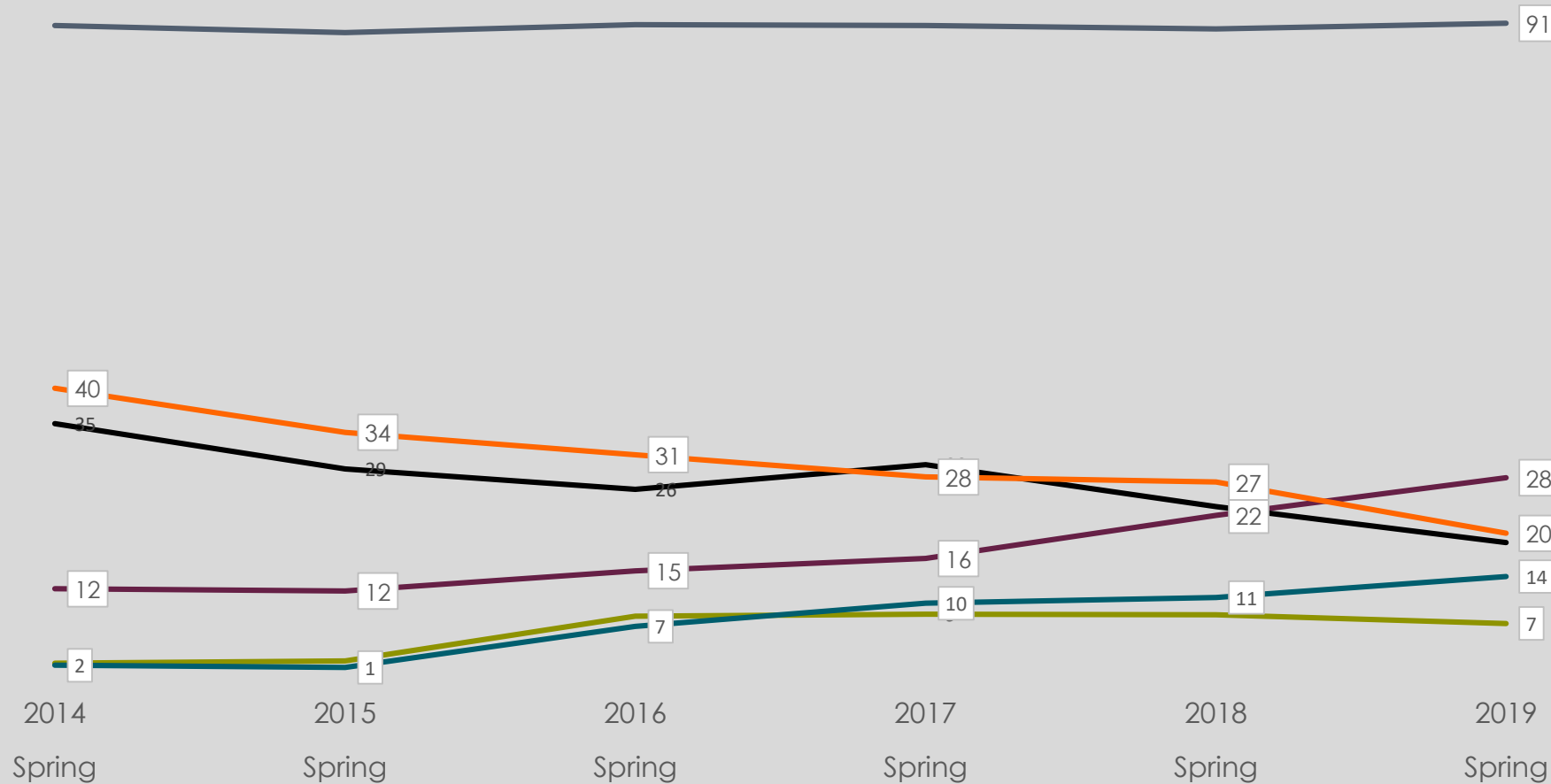
- Audiobooks
- Music CDs / Non music CDs / Cassette tapes
- Digital music / Non music tracks (e.g. mp3 / wmv / aac)
- Live Radio
- Podcasts/ Downloads
- On Demand music services (e.g. Spotify/ Apple Music)
- Any Listen Again/Catch up radio



The listening hours done via a Laptop or Desktop varies from Wave to Wave and between age groups.

Live Radio accounts for 39%, On Demand Music 32%, Digital Tracks 14%, Podcasts 8%, Listen Again 4% and CD's gradually becoming less used with a share of 2% of the hours. This is based on All Adults 15+.

OVER THE LAST 5 YEARS – ALL ADULTS 15+ Weekly Reach %



Live Radio has remained stable around 90% weekly reach.

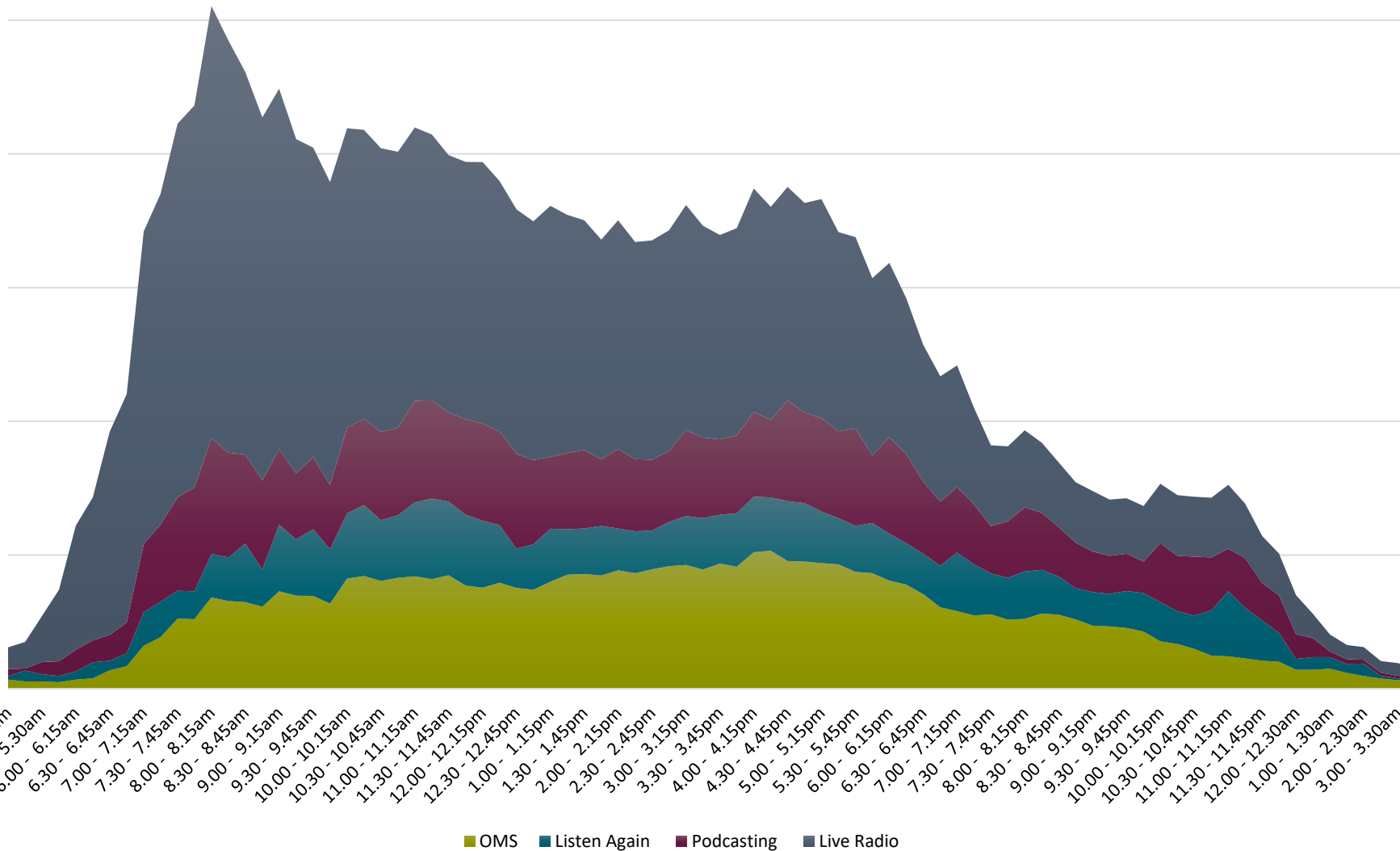
On Demand Music services has increased from 12% in 2014 to 28% in 2019

Podcast reach increases steadily every Wave. From 2% in 2014 to 14% currently.

We have seen decreases in the reach of CD's and Digital Tracks.

Listening Again or Catch Up radio has remained stable around the 7% mark over the last couple of years.

MONDAY – FRIDAY MIDWEEK AVERAGE



Live Radio listening peaks at 8.00am-8.15am

Podcasting 4.30-4.45pm

Listen Again 11.00 - 11.15am

On Demand Music 4.15 - 4.30pm